



How To Invoice

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Pointers to follow when invoicing:

- Invoice monthly for the whole month so that it is easy to track.
- If you invoice monthly, it is a job you do 12 times a year. In contrast, if you were to invoice weekly, it is a job you would do 52 times a year!
- Use the last months invoice and make a copy of it and edit that copy.
- We use Google Drive to store our invoices as it is accessible from any computer or device.



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- Plan time in your diary to write your invoices each month towards the end of the month, and block out time to do it in your diary. You normally need around 1-2 hours.
 - DO NOT let months go by without sending invoices, make sure you have them ready to send for the 1st of each month.
 - Do check that everyone has paid you each month and send reminders if needed.
 - Use a calculator with actual buttons that you press down rather than your phone, you make A LOT less typing mistakes on a proper calculator.



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- Write all your visits in a diary and length of time and any expenses occurred each day.
 - Then at the end of the month, tick off each visit as you add it to the invoice.
 - Write down the total of each invoice and who it is for, and tick it off once you have been paid.
 - I also like to write down the Grand Total each month so I can see if we have the correct amount of work on.





Invoice Templates

Visit Paperwork templates section to get some
invoice templates

[click here](#)





Top Tip!

Double check your invoices!

Sometimes it is easy to get a bit 'invoice blind'!

Go back the next day or at least later on in the day, and go through my invoices again.

Check how many visits for each week and check your math

There is normally a silly mistake somewhere to be spotted with a fresh set of eyes!





Task:

Send your first invoice

